

**1. Tax Returns**

a. Personal (2021-2023)

- i. If 2023 is extended, please provide 2020 and 2023 TR Extension form
- ii. Please provide the signed on the first page right above the name

b. Business (2021-2023)

- i. If 2023 is extended, please provide 2020 and 2023 TR Extension form
- ii. Please provide the signed on the first page right above the name

c. Affiliate Businesses (2021-2023)

- i. If 2023 is extended, please provide 2020 and 2023 TR Extension form
- ii. Please provide the signed on the first page right above the name

**2. Personal Financial Statements/Personal Cash Flow (Template Attached to the Email)**

- a. At a later stage, if the number does not match the number on the other documents, the PFS has to be rewritten again and delay the process.
- b. If you pay the credit card amount in full balance every month, please put 0 in the “Accounts Payable” section. If you pay the credit card amount, please provide the credit card balance and monthly payment on the side in the “Accounts Payable” section.

**3. Debt Schedule (Template Attached to the Email)**

- a. Please provide all the debts that the businesses you own